

SECTION VI
MILWAUKEE COUNTY DEPARTMENT ON AGING
SHOPPING AND ERRAND SERVICES
PROGRAM/SERVICE GUIDELINES

Applicants for Milwaukee County Department on Aging funding to provide Shopping and Errand Services must comply with 2015 program/service guidelines as summarized below. Applicant must describe how they will meet specific program/service guidelines in the appropriate section(s) of Exhibit I, Description of Proposed Programs and Services.

1) Program Requirements

- a.** The purpose of Shopping and Errand Services is to increase the independence of frail older adults by enabling them to remain in their own homes. The provider of this service must perform shopping and errand services for homebound clients. The service area is limited to the geographic boundaries of Milwaukee County, unless approved in advance by the Department on Aging contract manager.

Applicants must provide a written description how they will provide Shopping and Errand Services.

(Include in Section 2.0, Part 2a of Exhibit I)

- b.** Responsibilities of the service provider include, but are not limited to, the following:
- (1) Program administration;
 - (2) Scheduling of shopping and errand services;
 - (3) Vehicle maintenance;
 - (4) Maintaining and verifying driver and vehicle licenses;
 - (5) Required safety training, including certification in defensive driving and first aid;
 - (6) Maintaining required program client, service, and financial records;
 - (7) Developing strategies for targeted outreach to racial and ethnic minorities;
 - (8) Measuring program outcomes established by Department on Aging; and
 - (9) All other activities or requirements stated or implied by these Program/Service Guidelines.

Shopping and Errand Services receives funding through the Older Americans Act of 1965, as amended, and is subject to the provisions of that law and related rules and regulations.

- c.** Applicants must provide written evidence of their ability to provide Shopping and Errand Services throughout the contract period and must include estimates of the following:

- (1) The average number of shopping and errand services provided monthly.
- (2) The period of advance notice required to schedule shopping and errand services.

(Include in Section 2.0, Part 2a of Exhibit I)

- d. Applicants must provide evidence of financial integrity and prior experience in contract administration through including (1) a certified audit, if available, or (2) an independent evaluation of services provided under contract with another public or private agency.

(Include as Appendix VI of Exhibit I)

- e. Applicants must provide assurances that Shopping and Errand Services will be available throughout the contract year by describing their plan to accomplish this requirement.

(Include as Appendix VIII of Exhibit I)

- f. Applicants must indicate their experience in providing shopping and errand services to elderly participants. The applicant must submit a list of public and private contracts under which it served Milwaukee County older adults during the past three years. This listing should include the following information:

- (1) Name of the agency or firm that awarded the contract,
- (2) Program(s) or service(s) provided under the contract,
- (3) Program year(s), and
- (4) Total units of service provided to older persons.

Department on Aging staff may contact each agency for information on quality of services provided and levels of client satisfaction.

(Include as Appendix X of Exhibit I)

- g. Applicants proposing to subsidize the cost of Shopping and Errand Services through "other resources" must submit information on the source, nature, and dollar value of those resources. By definition, "other resources" may not include required non-federal match or estimates of client contributions.

(Include as Appendix XI of Exhibit I)

- h. Applicants must clearly indicate the procedures they will use to maintain accurate records of Shopping and Errand Services including (1) the name and address of each client, (2) the date and time each service occurred, (3) which staff person(s) provided the service, and (4) the purpose for each service.

(Include in Section 2.0, Part 2b of Exhibit I)

- i. Applicants must maintain minimum insurance coverage determined by the Milwaukee County Risk Manager in the following areas:

- (1) General liability,
- (2) Automobile liability,
- (3) Employers Liability and Workers Compensation, including waiver of subrogation;
- (4) Employee dishonesty; and
- (5) Milwaukee County as additional insured for General liability and Auto liability

The Department on Aging will not award a contract unless the applicant secures adequate coverage, as defined by County, and provides certificate(s) of insurance that includes all items listed above.

- j. Applicants must be willing to conform with all policies, specifications and guidelines relating to the operation of Shopping and Errand Services as determined by the Milwaukee County Department on Aging and the Milwaukee County Commission on Aging.

2) Eligible Programs and Services

- a. Shopping services include, but are not limited to, the following:

- (1) Assisting a homebound elder in the preparation of shopping lists.
- (2) Purchasing desired items on behalf of a homebound elder.
- (3) Transporting groceries and other items in a safe and sanitary condition to the homebound elder.
- (4) Provide receipts for all purchased items and return unused funds.

- b. Errand services are limited to the following:

- (1) Pickup prescription medications from a pharmacy.
- (2) Purchase over-the-counter medications at a pharmacy.
- (3) Purchase miscellaneous items when there to pickup or purchase medications.
- (4) Provide receipts for all purchased items and return unused funds.

3) Prohibited Activities

- a. Actions that violate provisions of the Shopping and Errand Services contract.

4) Initiation and Termination of Service

a. Initiation

Shopping and Errand Services initiated through:

- (a) Referral from the Milwaukee County Home Delivered Meal Program Contract Administrator,
- (b) Referral from the Milwaukee County Shopping and Errand Contract Administrator, or
- (c) Referral from the Milwaukee County Aging Resource Center.

b. Termination

Shopping and Errand Services terminated when:

- (a) The client has withdrawn his/her request for this service,
- (b) The client has moved to a nursing home, CBRF, or other care facility,
- (c) The client has moved out of the service area, and/or
- (d) Milwaukee County Department on Aging determines that the service is no longer available.

5) Limitations on the Provision of Service

- a.** The maximum number of client contacts per month for Shopping and Errand Services is limited as follows: Two contacts per month unless authorized, in advance, by the Department on Aging contract manager. The vendor may provide both shopping and errand tasks during the same contact.

6) Eligible Clients

- a.** Clients must be residents of Milwaukee County, age 60 or older, and with no other means of securing needed services.
- b.** Priority must be given to older persons having the greatest economic and/or social need defined by the Older Americans Act of 1965, as amended.

Under the Older Americans Act, the term "greatest economic need" refers to needs that result from monthly income at or below the federal poverty level. The term "greatest social need" refers to needs that result from non-economic factors such as (a) physical

and mental disabilities, (b) language barriers and (c) cultural, geographic, or social isolation. Factors of economic or social need may restrict the ability of an individual to live independently.

- c. The Department on Aging contract manager may request a list of the name, street address, municipality, zip code, and telephone number of each client and the vendor must provide that information within two business days.

7) **Program Personnel and Training**

General

- a. Applicants must submit a detailed staffing plan, including written job descriptions for each position involved in providing or administering this program.

(Include as Appendix I of Exhibit I)

- b. Applicants must clearly describe when and how program staff will be trained in the following areas: (1) awareness of the special needs of older adults and (2) maintaining accurate records of services provided under contract with the Department on Aging.

Shoppers/Direct Service Staff

- a. Shopping and Errand direct service staff must throughout the term of the contract meet the following training and/or certification requirements:

- (1) All shoppers must be insurable and possess good safety records; all staff handling client funds must be bonded.
- (2) All shoppers must possess a valid Wisconsin motor vehicle driver's license.
- (3) All shoppers must maintain certification in first aid training. Initial certification must take place prior to participation in any Department on Aging contract.
- (4) All shoppers must maintain certification in defensive driving. Initial certification must take place prior to participation in any Department on Aging contract.
- (5) All shoppers and administrators must be trained to handle emergency situations.
- (6) All shoppers are encouraged to be certified in CPR and maintain that certification.

- b. The service provider must maintain information on shopper training, making that information available for inspection by the Department on Aging contract manager during regular business hours. The information must include the date and duration of each shopper training session, name of instructor, and topic(s) covered. The file must

also include information on the license(s) held by shoppers and their certifications in defensive driving and first aid.

- c. While on duty, all shoppers must wear forms of identification that contain the following information: (1) the driver's name and (2) the agency name or logo.

8) Program Organization

- a. Applicants must clearly show the agency's organizational structure and how it relates to the administration of this program.
- b. Applicants must clearly identify the individual(s) within the contract agency who will be:
 - (1) Solely responsible for the program.
 - (2) Authorized to sign for the program.
 - (3) Authorized to receive checks for the program.
 - (4) Responsible for fiscal and budgetary matters.
 - (5) Responsible for data collection, analysis and completion of reporting forms.
 - (6) Responsible for internal monitoring of the program.
 - (7) Responsible for responding to client concerns regarding service quality.

(Include as Appendix XIII of Exhibit I)

9) Communication and Maintenance

- a. Applicants must be able to communicate with vehicles by two-way radio, cell phone or smart phone to assure prompt and efficient service.
- b. Applicants must maintain vehicles used to provide Shopping and Errand Services according to manufacturers' specifications. Maintenance should take place on a scheduled basis, with detailed records kept to document the work done on each vehicle.
- c. All vehicles operating under contract with the Department on Aging must include the company's name and/or logo on the vehicle exterior.
- d. Any vehicle used to provide Shopping and Errand Services must display a sign that states: "Services Funded by Milwaukee County Government" while providing that service.

10) Program Service Coordination

- a.** The provider of Shopping and Errand Services must coordinate this service with other programs and services for older adults. The applicant should provide information regarding the agency's experience in coordinating aging services.
- b.** Applicants must clearly describe an emergency plan for maintaining the provision of services to older adults. Include provisions for staff absenteeism, vehicle breakdowns, and severe weather.

11) Contributions

- a.** Applicants must provide written evidence of the ability to solicit, collect, and record voluntary client contributions. The evidence must include a clear description of the handling and reconciliation of cash contributions. Procedures must be in accord with Department on Aging policies.
- b.** Contributions must be voluntary, confidential, and related to the cost of the services provided. Solicitation of voluntary contributions must always respect the dignity and confidentiality of participants. Contributions are voluntary and under absolutely no circumstances will the availability of service depend on clients making a contribution. If the applicant agency plans to solicit contributions, include an example of an appeal letter as **Appendix VII**.
- c.** All client contributions, including those mailed to the agency, must be clearly recorded and deposited in a bank account. Contributions must be deposited at least once a week. The service provider must acknowledge contributions mailed to the agency.
- d.** Client contributions will be used to reimburse costs and/or increase services.
- d.** Under no circumstances may Shopping and Errand staff solicit or accept gratuities.

12) Service Reimbursement

Service will be reimbursed monthly based on actual costs consistent with an original or revised program budget and the Wisconsin allowable cost policy manual.

13) Outcomes

The service provider must measure program outcomes through a survey that asks clients to respond to the following statement "The service helps me to live on my own" using five possible responses (strongly agree, agree, neither agree or disagree, disagree, and strongly disagree).

14) Contract Extension

The contract awarded will be for the period January 1, to December 31, 2015.

Any contract extension will be contingent upon satisfactory performance of the service provider, willingness of the provider to extend the contract, inclusion of sufficient funding in the Adopted County Budget for the year the contract is extended, and authorization by the Milwaukee County Board of Supervisors and/or County Executive.